



## Corporate Training Materials

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### United States

**73 Greentree Drive, Box #68**

**Dover, Delaware 19904**

**Toll-free: 1-877-610-3660**

**Fax: 1-877-610-3661**

[sales@corporatetrainingmaterials.com](mailto:sales@corporatetrainingmaterials.com)

### International

**116 Provost Street, New Glasgow, NS**

**Canada, B2H 2P4**

**Phone: 001-902-695-3660**

**Fax: 001-902-695-3661**

[sales@corporatetrainingmaterials.com](mailto:sales@corporatetrainingmaterials.com)

Any technical issues or questions can be addressed by our support team

[support@corporatetrainingmaterials.com](mailto:support@corporatetrainingmaterials.com)

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# TABLE OF CONTENTS

---

|   |           |
|---|-----------|
| <b>Preface .....</b>                            | <b>3</b>  |
| <i>What is Courseware?.....</i>                 | <i>3</i>  |
| <i>How Do I Customize My Course? .....</i>      | <i>3</i>  |
| <i>Materials Required .....</i>                 | <i>4</i>  |
| <i>Maximizing Your Training Power.....</i>      | <i>5</i>  |
| <b>Icebreakers.....</b>                         | <b>6</b>  |
| <i>Icebreaker: Friends Indeed.....</i>          | <i>7</i>  |
| <b>Instructor Guide Sample.....</b>             | <b>8</b>  |
| <i>Sample Module: It Starts at the Top.....</i> | <i>9</i>  |
| <b>Activities .....</b>                         | <b>9</b>  |
| <b>Quick Reference Sheets.....</b>              | <b>20</b> |
| <b>Certificate of Completion .....</b>          | <b>22</b> |
| <b>PowerPoint Sample.....</b>                   | <b>22</b> |
| <b>Full Course Table of Contents .....</b>      | <b>27</b> |

## Preface



### What is Courseware?

Welcome to Corporate Training Materials, a completely new training experience!

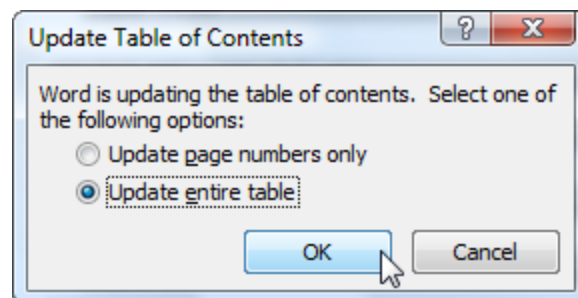
Our courseware packages offer you top-quality training materials that are customizable, user-friendly, educational, and fun. We provide your materials, materials for the student, PowerPoint slides, and a take-home reference sheet for the student. You simply need to prepare and train!

Best of all, our courseware packages are created in Microsoft Office and can be opened using any version of Word and PowerPoint. (Most other word processing and presentation programs support these formats, too.) This means that you can customize the content, add your logo, change the color scheme, and easily print and e-mail training materials.

### How Do I Customize My Course?

Customizing your course is easy. To edit text, just click and type as you would with any document. This is particularly convenient if you want to add customized statistics for your region, special examples for your participants' industry, or additional information. You can, of course, also use all of your word processor's other features, including text formatting and editing tools (such as cutting and pasting).

To remove modules, simply select the text and press Delete on your keyboard. Then, navigate to the Table of Contents, right-click, and click Update Field. You may see a dialog box; if so, click "Update entire table" and press OK.

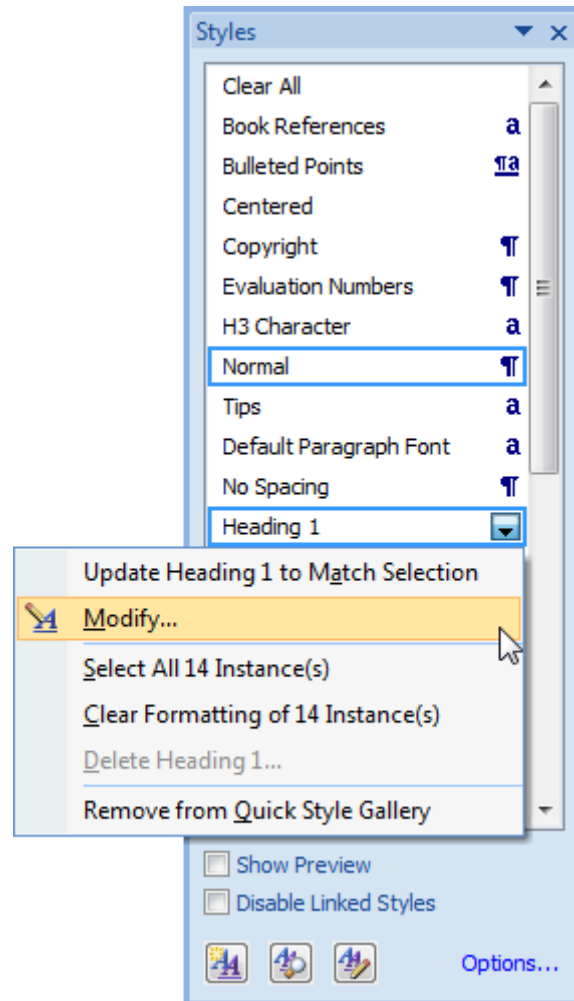


(You will also want to perform this step if you add modules or move them around.)

If you want to change the way text looks, you can format any piece of text any way you want. However, to make it easy, we have used styles so that you can update all the text at once.

If you are using Word 97 to 2003, start by clicking the Format menu followed by Styles and Formatting. In Word 2007 and 2010 under the Home tab, right-click on your chosen style and click Modify. That will then produce the Modify Style options window where you can set your preferred style options.

For example, if we wanted to change our Heading 1 style, used for Module Titles, this is what we would do:



Now, we can change our formatting and it will apply to all the headings in the document.

For more information on making Word work for you, please refer to [Word 2007 or 2010 Essentials](#) by Corporate Training Materials.

## Materials Required

All of our courses use flip chart paper and markers extensively. (If you prefer, you can use a whiteboard or chalkboard instead.)

We recommend that each participant have a copy of the Training Manual, and that you review each module before training to ensure you have any special materials required. Worksheets and handouts are included within a separate activities folder and can be reproduced and used where indicated. If you would like to save paper, these worksheets are easily transferrable to a flip chart paper format, instead of having individual worksheets.

We recommend these additional materials for all workshops:

- Laptop with projector, for PowerPoint slides
- Quick Reference Sheets for students to take home
- Timer or watch (separate from your laptop)
- Masking tape
- Blank paper

## Maximizing Your Training Power

We have just one more thing for you before you get started. Our company is built for trainers, by trainers, so we thought we would share some of our tips with you, to help you create an engaging, unforgettable experience for your participants.

- **Make it customized.** By tailoring each course to your participants, you will find that your results will increase a thousand-fold.
  - Use examples, case studies, and stories that are relevant to the group.
  - Identify whether your participants are strangers or whether they work together. Tailor your approach appropriately.
  - Different people learn in different ways, so use different types of activities to balance it all out. (For example, some people learn by reading, while others learn by talking about it, while still others need a hands-on approach. For more information, we suggest Experiential Learning by David Kolb.)
- **Make it fun and interactive.** Most people do not enjoy sitting and listening to someone else talk for hours at a time. Make use of the tips in this book and your own experience to keep your participants engaged. Mix up the activities to include individual work, small group work, large group discussions, and mini-lectures.
- **Make it relevant.** Participants are much more receptive to learning if they understand why they are learning it and how they can apply it in their daily lives. Most importantly, they want to know how it will benefit them and make their lives easier. Take every opportunity to tie what you are teaching back to real life.
- **Keep an open mind.** Many trainers find that they learn something each time they teach a workshop. If you go into a training session with that attitude, you will find that there can be an amazing two-way flow of information between the trainer and trainees. Enjoy it, learn from it, and make the most of it in your workshops.

And now, time for the training!

## **Icebreakers**

Each course is provided with a wide range of interactive Icebreakers. The trainer can utilize an Icebreaker to help facilitate the beginning of the course, as it helps “break the ice” with the participants. If the participants are new to each other, an icebreaker is a great way to introduce everyone to each other. If the participants all know each other it can still help loosen up the room and begin the training session on positive note. Below you will see one of the icebreakers that can be utilized from the Icebreakers folder.

## **Icebreaker: Friends Indeed**

### **Purpose**

Have the participants moving around and help to make introductions to each other.

### **Materials Required**

- Name card for each person
- Markers

### **Preparation**

Have participants fill out their name card. Then, ask participants to stand in a circle, shoulder to shoulder. They should place their name card at their feet. Then they can take a step back. You as the facilitator should take the place in the center of the circle.

### **Activity**

Explain that there is one less place than people in the group, as you are in the middle and will be participating. You will call out a statement that applies to you, and anyone to whom that statement applies must find another place in the circle.

Examples:

- Friends who have cats at home
- Friends who are wearing blue
- Friends who don't like ice cream

The odd person out must stand in the center and make a statement.

The rules:

- You cannot move immediately to your left or right, or back to your place.
- Let's be adults: no kicking, punching, body-checking, etc.

Play a few rounds until everyone has had a chance to move around.

## **Instructor Guide Sample**

On the following pages is a sample module from our Instructor Guide. It provides the instructor with a copy of the material and a Lesson Plans box.

The key benefit for the trainer is the Lesson Plan box. It provides a standardized set of tools to assist the instructor train that particular lesson. The Lesson Plan box gives an estimated time to complete the lesson, any materials that are needed for the lesson, recommended activities, and additional points to assist in delivering the lessons such as Stories to Share and Delivery Tips.



*If you're not serving the customer, your job is to be serving someone who is.*

***Jan Carlzon***

## **Sample Module: It Starts at the Top**



deliver that information.

There is a very common saying, 'Attitude reflects leadership.' A manager sets the tone for the whole staff. If a manager shows the staff that having the appropriate information is important, it will be more likely to be utilized. You can help your staff be the best contact center possible by creating an open culture, knowing the goals of the company, knowing your employees job duties, and being able to identify additional training opportunities. A manager has to have their eyes peeled at all times for new information needed, and new ways to

## Create an Open Culture



When you are a manager, it is important that you create an open culture with your staff. What is an open culture? An open culture means that as a manager, you are creating an environment where employees feel free to share ideas and concerns. This type of environment helps employees feel empowered and important, which helps them want to come to work and do a great job. When an employee starts to feel like they don't matter to a company, it can bring down not only the whole department but the company itself. Here are some ideas that will help you create an open culture in your company:

- **Loose the door** – taking out the door or leaving your door open tells your staff that you're available for them.
- **Don't be secretive** – you are not working for the Pentagon, tell the staff what's up. When you as a manager keep secrets, it has a tendency to make the staff feel paranoid, and/or unimportant.
- **Recognize that change is not always black and white** – change can be hard on anyone. There will always be the good with the bad. Let your staff tell you their opinions on changes that were made. Be open to their concerns and suggestions
- **Have one on one training sessions with your staff members**- this helps the staff members get to know management on a more personal level, and makes them more likely to voice concerns or suggestions later on.

|                      |  |
|----------------------|--|
| Estimated Time       | 8 minutes  |
| Topic Objective      | Review creating an open culture.   |
| Topic Summary        | <b>Create an Open Culture</b><br>Discuss what an open culture is and why it's important.   |
| Materials Required   | Flipchart/board, marker  |
| Planning Checklist   | None   |
| Recommended Activity | Discuss the section as a group. What additional ways can you come up with to create an open culture in your company? List suggestions on the board, vote on the top 3 ideas. |
| Stories to Share     | Share any personal, relevant stories.  |
| Delivery Tips        | Encourage everyone to participate.   |
| Review Questions     | Have you worked in a business that had an open culture?  |

## Understand Goals



The worst thing a manager can do is to not understand the goals of the company. This entails looking at the company as a whole, in a large scope. Try asking yourself, and your supervisor these questions:

- What is the company trying to achieve?
- What are the company's long-term and short-term goals?
- What does the company need in order to accomplish these goals?
- How can my department help facilitate those goals?

Without knowing where the company itself is wanting to go, you won't know how to get there. Talk to your own supervisors to understand the goals of the company. Once you understand what the company wants to accomplish, you can set goals for your staff. When setting the goals for your staff, make sure to be very clear about the goal that you're wanting to accomplish, and the steps it will take to accomplish it. Make sure that the goals you set are realistic.

|                             |   |
|-----------------------------|---|
| <b>Estimated Time</b>       | <b>7 minutes</b>  |
| <b>Topic Objective</b>      | Review the importance of understanding a company's goals.   |
| <b>Topic Summary</b>        | <b>Understand Goals</b><br><br>Understand why you should know your company's goals.   |
| <b>Materials Required</b>   | <b>None</b>   |
| <b>Planning Checklist</b>   | None  |
| <b>Recommended Activity</b> | Does your company have goals? Discuss as a group the goals of your company. How can you help the company achieve those goals? |
| <b>Stories to Share</b>     | Share any personal, relevant stories.   |
| <b>Delivery Tips</b>        | Encourage everyone to participate.  |
| <b>Review Questions</b>     | Do you know what your company's goal is?  |

## Understand Agents' Responsibilities



There is nothing worse, from an employee standpoint, than a manager that doesn't understand the job duties and processes of an employee. If the manager doesn't understand responsibilities of a contact center employee, how is the employee supposed to understand them? Take the time to talk to your supervisors so that you know what is expected of your employees. If you are a new manager, asked to be trained as if you were one of your employees. This way you can see the processes, and learn how to improve them for your employees and customers. Knowing their processes, and what their job responsibilities are also helps you train future employees.

|                             |  |
|-----------------------------|--|
| <b>Estimated Time</b>       | <b>7 minutes</b>   |
| <b>Topic Objective</b>      | Review why a manager should understand an agent's responsibilities.  |
| <b>Topic Summary</b>        | <b>Understand Agents' Responsibilities</b><br>Recognize the benefits of understanding an agent's responsibilities. |
| <b>Materials Required</b>   | <b>Flipchart/board, marker</b>   |
| <b>Planning Checklist</b>   | None   |
| <b>Recommended Activity</b> | Discuss as a group the benefits of understanding an agent's responsibilities.<br>Make a list of pros on the board. |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | Do you know your employees' job responsibilities and processes?  |

## Identify Education Opportunities



There is never a point when an employee has learned too much. Employees who learn, are more engaged in their jobs. As a manager it's your job to make sure that your employees remain engaged, and are effective in their positions. You can see what training or education would be beneficial to the company and employee. Having educational opportunities helps maintain employee engagement, thus retaining more employees. Engaging employees helps them feel important and part of the company, instead of just another lackey. Education opportunities can come in many shapes and sizes. Here are just a few different educational opportunities your company could provide for your employees:

- College tuition reimbursement
- Cross Training
- One-on-one training
- Seminars & workshops

Having these education opportunities helps the employees feel like the company cares about their personal growth. Happy employees create happy customers.

|                             |  |
|-----------------------------|--|
| <b>Estimated Time</b>       | <b>7 minutes</b>   |
| <b>Topic Objective</b>      | Review why it's good to identify employment opportunities for your employees.  |
| <b>Topic Summary</b>        | <b>Identify Education Opportunities</b><br>Recognize the types of employment opportunities that could be available for your staff. |
| <b>Materials Required</b>   | <b>01: Education Opportunities</b>   |
| <b>Planning Checklist</b>   | <b>None.</b>   |
| <b>Recommended Activity</b> | Fill out the worksheet individually. Discuss results as a group.   |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | Why should you worry about getting your staff more education?  |

## Case Study



Liam has been hired as a new member of the management team at Schneider & Associates. Emma is Liam's supervisor, and she wants to make sure Liam has the resources he needs to succeed. She works one on one with him, and explains the company's goals. She tells him about the Open Door policy, and how important it is that he is available for his staff just as she is for him. Emma has Liam train with one of the company's top performers in his department. She wants him to know the processes in which the employees perform their tasks. While Liam trains, he asks the employee questions about what they would change about their current processes. He gets some ideas on how to improve their procedures. Liam is very excited to help his employees be the best they can be.

|                             |  |
|-----------------------------|--|
| <b>Estimated Time</b>       | <b>8 minutes</b>   |
| <b>Topic Objective</b>      | Outline the ' <b>It Starts at the Top</b> ' case study.  |
| <b>Topic Summary</b>        | <b>Case study</b><br>Discuss the importance of learning from an agent's point-of-view.                   |
| <b>Materials Required</b>   | <b>None</b>  |
| <b>Planning Checklist</b>   | None   |
| <b>Recommended Activity</b> | Discuss the outcome of the case study. Why did Emma ask Liam to train as if he was one of his employees? |
| <b>Stories to Share</b>     | Share any personal, relevant stories.  |
| <b>Delivery Tips</b>        | Encourage everyone to participate.   |
| <b>Review Questions</b>     | Was training with his top performer helpful?   |

## Module Two: Review Questions

1. What is an open culture?

- a) Creating an environment where employees feel safe to express ideas or concerns.
- b) Creating a work space that has no walls, windows, or doors.
- c) Creating an environment where employees are discouraged to express ideas or concerns.
- d) None of the above.

An open culture is interperated in this contexts as a work environment in which the manager makes the employees feel comfortable to share ideas and concerns. An open culture helps employees feel invested and paramount to the company. When an employee is engaged in their job, this helps them want to come to work and do a great job.

2. Which of the following should a manager not do when creating an Open Culture in the workplace?

- a) Leave his door open.
- b) Recognize that change is always black and white.
- c) Be transparent about goals, or issues the department is having.
- d) All of the above.

There are many ways to create an Open Culture in your work place. Most important is that you want to convey to your employees that you are open to hearing what they are saying, be it good or bad. Change is hard for everyone, and the results are not always black and white. There will be some changes that have negative impact, but mostly positive results. As a manager it is your job to access those changes and make sure they are for the good of the employees and the company.

3. What question should a manager ask when determining the company's goals?

- a) How can I advance my career?
- b) How can my department help the company reach its goals?
- c) Which employees can I fire?
- d) What does my company sell?

A manager should be asking themselves, and their supervisors about the goals of the company. What is my company trying to accomplish? What are the company's short term and long term goals? What steps is the company wanting to take to accomplish these goals? How can my department help the company achieve those goals?

4. What can you do once you understand the goals of the company?

- a) You can decide who should get fired.
- b) You can change everything to how you like it.
- c) You can create a closed culture.
- d) You can decide what goals your department needs.

Once you understand the goals of the company you can decide how you and your department can help achieve those goals. A goal is like a recipe, and you have to follow the steps to achieve the goal.

5. Why should you train as if you were one of your employees?

- a) So that you can see who is slacking.
- b) You don't need to train as if you were your employee.
- c) So you can understand their procedures.
- d) None of the above.

Training as if you were one of your employees is a very important tool. This training helps you understand the processes, so you can see what is working and what doesn't. It also lets you get to know your employees and their habits. It creates an open culture, since the employees will feel like you don't think you're too good for them. There are lots of positives with this type of training.

6. From an employee's perspective, which of the following is a benefit of your supervisor understanding your job duties and processes?

- a) They can see how to improve the processes.
- b) They can understand how unhappy the other supervisors are.
- c) They can see who likes the company the most.
- d) All of the above.

For a manager to not know the duties and processes of an employee, makes it hard for the manager to know the expectations. With having the experience of their employee's jobs, they can see what needs to change to make happier employees, increase productivity, and customer satisfaction.



7. How does education opportunities for employees help the company?

- a) The employees feel pressured to get a degree.
- b) The employees feel like the company cares about them.
- c) The employees feel like the company wants to get rid of them.
- d) None of the above.

Educational opportunities for employees shows that the company cares about the employee's personal growth. An employee that feels like the company cares about them, are happier, and give better customer service.

8. Which of the following is not an example of an education opportunity?

- a) College tuition reimbursement.
- b) Watching YouTube.
- c) Cross Training.
- d) Seminars & workshops.

There are many opportunities for education that a company can give its employees. Cross training is an example of education, that could allow an employee advancement opportunities. College tuition reimbursement, and providing seminars and workshops are other examples of education opportunities.

9. Who has been hired as a new member of the management team at Schneider & Associates?

- a) Luke.
- b) Robert.
- c) Liam.
- d) Emma.

Liam was hired as a new member of the management team at Schneider & Associates. Emma is Liam's supervisor, and she has a goal of making sure that Liam has the resources he needs to be a success.

10. Which of the following is not part of Emma's training plan for Liam?

- a) She works with him One-on-One.
- b) She asks Liam before training how he could improve performance.
- c) She has him train with one of the top performers.
- d) None of the above.

Emma works one on one with Liam, and explains the company's goals. Emma tells him the importance of keeping an open door policy. She wants him to be available for his staff. Emma has Liam train with one of the company's top performers in his department. She wants him to know the processes in which the employees perform their tasks.

## **Activities**

During the facilitation of a lesson Worksheet or Handout may be utilized to help present the material. If a lesson calls for a Worksheet or Handout it will be listed in the Lesson Plan box under Materials Required. The trainer can then utilize the Activities folder for the corresponding material and then provide it to the participants. They are all on separate Word documents, and are easily edited and customized.

Below you will see the Worksheets or Handouts that are utilized during the training of the above lesson. They are located in the Activities folder and can be easily printed and edited for the participants.

# Sample Worksheet: Education Opportunities

Use the lines below to list the different types of educational opportunities you could suggest for your staff. How would it benefit the employee? How would it benefit the company?

| Educational Opportunity: | Employee Benefit: | Company Benefit: |
|--------------------------|-------------------|------------------|
| 1.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 2.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 3.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 4.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 5.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 6.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 7.) _____<br>_____       | _____<br>_____    | _____<br>_____   |
| 8.) _____<br>_____       | _____<br>_____    | _____<br>_____   |

## **Quick Reference Sheets**

Below is an example of our Quick reference Sheets. They are used to provide the participants with a quick way to reference the material after the course has been completed. They can be customized by the trainer to provide the material deemed the most important. They are a way the participants can look back and reference the material at a later date.

They are also very useful as a take-away from the workshop when branded. When a participant leaves with a Quick Reference Sheet it provides a great way to promote future business.

# Contact Center Training

## Linear Thinking

Linear thinking involves step-by-step progression. A linear thinker expects one step to be addressed before moving on to the next step. This could be considered a logical way of thinking to ensure each piece of the puzzle properly fits into place so that no important detail is missed. Although not everyone is a natural born linear thinker, this skill can be very helpful in getting to the root of and resolving a customer service issue.

Common characteristics of linear thinkers:

- Structure-based
- Traditional
- Like to implement solutions
- Stick to the facts

## Allow Customer to Talk

In a conversation, there is the person who talks, and the person who listens, that part is pretty basic. These roles can be interchangeable but there is always someone who takes the lead on talking, in this context that should be the customer. As we have talked about before, it is very common for a phone operator to become too focused at the task at hand and forget to use their listening skills. No one likes to be interrupted, so a contact center agent has to make sure to be patient. Customers who are constantly interrupted start feeling like they are being rushed, or that you are not invested in assisting them. You want to give the customer 100% of your attention, and make sure you are understanding their needs and feelings. Sometimes you will get customers that just need to vent their frustrations, and sometimes you will get customers who have a hard time expressing their needs. Allowing the customer to finish talking, uninterrupted, will show them you value them as a customer and are ready and willing to help them.

## Smile in Your Voice

One great way to start building rapport with your customers is by having a smile in your voice. No one wants to call and talk to a grumpy employee. Having a smile in your voice puts the customer at ease and makes them feel welcome to call. Also having a smile helps your inflection on the phone. How do you keep a smile in your voice during a phone call?

- Answer the call with a smile, a real smile! Caller can hear your smile, and it will make you more genuine.
- Utilize a mirror to remind yourself to smile when you are taking a call.
- Have pictures around that bring a smile to your face.
- Remember to leave your baggage at the door, and keep yourself upbeat.

## **Certificate of Completion**

Every course comes with a Certificate of Completion where the participants can be recognized for completing the course. It provides a record of their attendance and to be recognized for their participation in the workshop.

# CERTIFICATE OF COMPLETION

**[Name]**

*Has mastered the course*

*Contact Center Training*

Awarded this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_

Presenter Name and Title

\_\_\_\_\_

## **PowerPoint Sample**

Below you will find the PowerPoint sample. The slides are based on and created from the Instructor Guide. PowerPoint slides are a great tool to use during the facilitation of the material; they help to focus on the important points of information presented during the training.



## Module Two: It Starts at the Top

There is a very common saying, 'Attitude reflects leadership.' A manager sets the tone for the whole staff. If a manager shows the staff that having the appropriate information is important, it will be more likely to be utilized.

*Data beats emotion.  
"If you're not serving the customer, your job is to be serving someone who is."*

*-Jan Carlzon*

## Create an Open Culture

Loose door

Don't be secretive

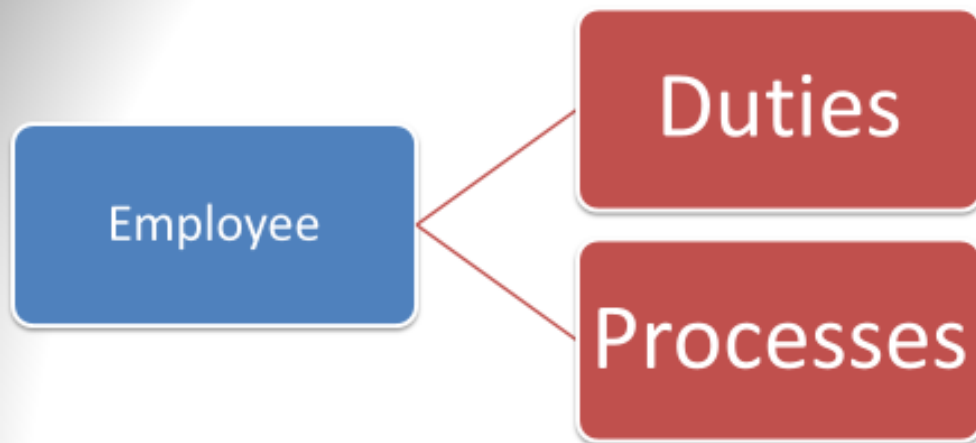
Change

One-on-One  
Training

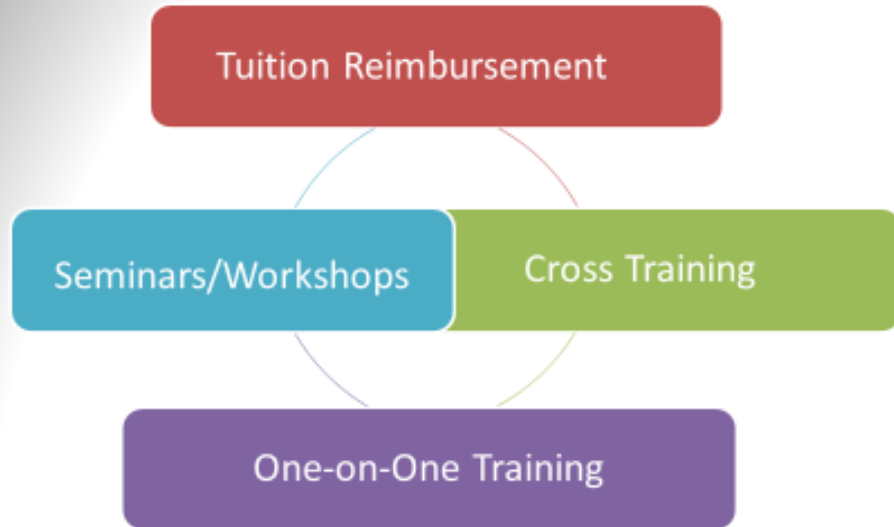
## Understand Goals



## Understand Agents' Responsibilities



## Identify Education Opportunities



## Case Study



## Module Two: Review Questions

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- c) Be transparent about goals, or issues the department is having.
- d) All of the above.

There are many ways to create an Open Culture in your work place. Most important is that you want to convey to your employees that you are open to hearing what they are saying, be it good or bad. Change is hard for everyone, and the results are not always black and white. There will be some changes that have negative impact, but mostly positive results. As a manager it is your job to access those changes and make sure they are for the good of the employees and the company.

# Full Course Table of Contents

|  |           |
|--|-----------|
| <b>Preface .....</b>                             | <b>1</b>  |
| <i>What is Courseware?.....</i>                  | <i>2</i>  |
| <i>How Do I Customize My Course? .....</i>       | <i>2</i>  |
| <i>Materials Required .....</i>                  | <i>2</i>  |
| <i>Maximizing Your Training Power.....</i>       | <i>3</i>  |
| <i>Action Plan Form.....</i>                     | <i>3</i>  |
| <i>Evaluation Form.....</i>                      | <i>3</i>  |
| <b>Module One: Getting Started .....</b>         | <b>5</b>  |
| <i>Housekeeping Items.....</i>                   | <i>5</i>  |
| <i>The Parking Lot.....</i>                      | <i>5</i>  |
| <i>Workshop Objectives .....</i>                 | <i>5</i>  |
| <b>Module Two: It Starts at the Top .....</b>    | <b>6</b>  |
| <i>Create an Open Culture .....</i>              | <i>6</i>  |
| <i>Understand Goals .....</i>                    | <i>7</i>  |
| <i>Understand Agents' Responsibilities .....</i> | <i>7</i>  |
| <i>Identify Education Opportunities.....</i>     | <i>8</i>  |
| <i>Case Study.....</i>                           | <i>8</i>  |
| <i>Module Two: Review Questions.....</i>         | <i>9</i>  |
| <b>Module Three: Peer Training .....</b>         | <b>13</b> |
| <i>Top Performing Employees .....</i>            | <i>13</i> |
| <i>Discuss Role with Company .....</i>           | <i>14</i> |
| <i>Critique Previously Recorded Calls.....</i>   | <i>14</i> |
| <i>Cross Training .....</i>                      | <i>15</i> |
| <i>Case Study.....</i>                           | <i>15</i> |

|   |           |
|---|-----------|
| <i>Module Three: Review Questions .....</i>                                     | <i>16</i> |
| <b>Module Four: How to Build Rapport .....</b>                                  | <b>17</b> |
| <i>Smile in Your Voice.....</i>   | <i>17</i> |
| <i>Engage in Small Talk.....</i>  | <i>18</i> |
| <i>Listen, Acknowledge, and Empathize .....</i>                                 | <i>18</i> |
| <i>Be Yourself.....</i>   | <i>19</i> |
| <i>Case Study.....</i>  | <i>19</i> |
| <i>Module Four: Review Questions .....</i>                                      | <i>20</i> |
| <b>Module Five: Learn to Listen .....</b>                                       | <b>21</b> |
| <i>Allow Customer to Talk.....</i>  | <i>21</i> |
| <i>Avoid Judgment .....</i>   | <i>22</i> |
| <i>Take Notes .....</i>   | <i>22</i> |
| <i>Recap the Call .....</i>   | <i>23</i> |
| <i>Case Study.....</i>  | <i>23</i> |
| <i>Module Five: Review Questions .....</i>                                      | <i>23</i> |
| <b>Module Six: Manners Matter - Etiquette &amp; Customer Service One.....</b>   | <b>24</b> |
| <i>Scripting .....</i>  | <i>24</i> |
| <i>Dead Air .....</i>   | <i>25</i> |
| <i>Tone &amp; Inflection.....</i>   | <i>25</i> |
| <i>Saying it the Right Way .....</i>  | <i>26</i> |
| <i>Case Study.....</i>  | <i>26</i> |
| <i>Module Six: Review Questions .....</i>                                       | <i>27</i> |
| <b>Module Seven: Manners Matter - Etiquette &amp; Customer Service Two.....</b> | <b>28</b> |
| <i>“Reading” Your Customers .....</i>   | <i>29</i> |
| <i>Properly Transferring Calls .....</i>  | <i>29</i> |
| <i>Going the Extra Mile .....</i>   | <i>30</i> |

|   |           |
|---|-----------|
| <i>Limit Given Information</i> .....                        | 30        |
| <i>Case Study</i> .....                                     | 31        |
| <i>Module Seven: Review Questions</i> .....                 | 31        |
| <b>Module Eight: Handling Difficult Customers</b> .....     | <b>32</b> |
| <i>Keep Calm</i> .....                                      | 32        |
| <i>Listen, Repeat, and Apologize</i> .....                  | 33        |
| <i>Avoid Placing Blame</i> .....                            | 33        |
| <i>Solve the Problem</i> .....                              | 34        |
| <i>Case Study</i> .....                                     | 34        |
| <i>Module Eight: Review Questions</i> .....                 | 34        |
| <b>Module Nine: Getting the Necessary Information</b> ..... | <b>35</b> |
| <i>Have a Checklist</i> .....                               | 35        |
| <i>Linear Thinking</i> .....                                | 36        |
| <i>Open-Ended Questions</i> .....                           | 36        |
| <i>Close-Ended Questions</i> .....                          | 37        |
| <i>Case Study</i> .....                                     | 37        |
| <i>Module Nine: Review Questions</i> .....                  | 38        |
| <b>Module Ten: Performance Evaluations</b> .....            | <b>39</b> |
| <i>Consistent Service</i> .....                             | 39        |
| <i>Abandoned Calls</i> .....                                | 40        |
| <i>Speed of the Answer</i> .....                            | 40        |
| <i>Length of Call</i> .....                                 | 41        |
| <i>Case Study</i> .....                                     | 41        |
| <i>Module Ten: Review Questions</i> .....                   | 42        |
| <b>Module Eleven: Training Doesn't Stop</b> .....           | <b>43</b> |
| <i>Evaluate Progress</i> .....                              | 43        |

|   |           |
|---|-----------|
| <i>Get Feedback on Training .....</i>                   | <i>44</i> |
| <i>Kudos to Deserving Employees .....</i>               | <i>44</i> |
| <i>Have Monthly Meetings .....</i>                      | <i>45</i> |
| <i>Case Study.....</i>                                  | <i>45</i> |
| <i>Module Eleven: Review Questions.....</i>             | <i>46</i> |
| <b>Module Twelve: Wrapping Up .....</b>                 | <b>47</b> |
| <i>Words from the Wise.....</i>                         | <i>47</i> |
| <i>Review of Parking Lot .....</i>                      | <i>47</i> |
| <i>Lessons Learned.....</i>                             | <i>48</i> |
| <i>Completion of Action Plans and Evaluations .....</i> | <i>48</i> |